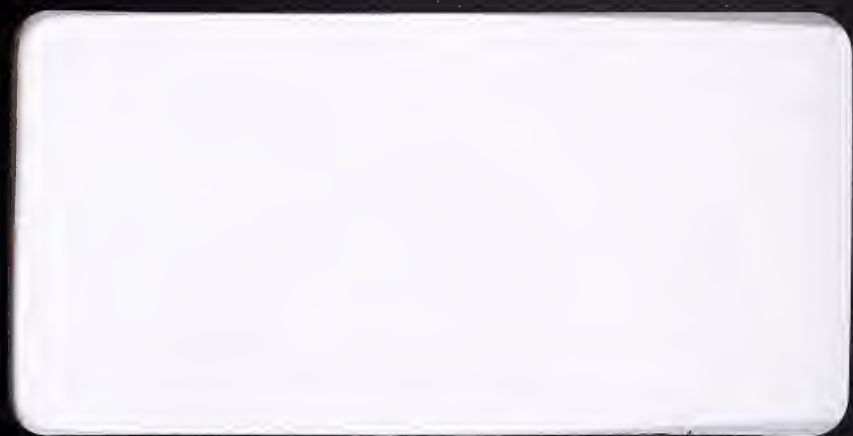


Client Meeting
Oberstötzingen

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Client Meeting Oberstötzingen

29 September 1993

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Prepared by
INPUT
17 hill Street
London W1X 7FB
United Kingdom

Customer Services Programme—Europe

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Environmental Services

From Cabling to Premises Management

CSP-ML- A1

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Notes

Environmental Services

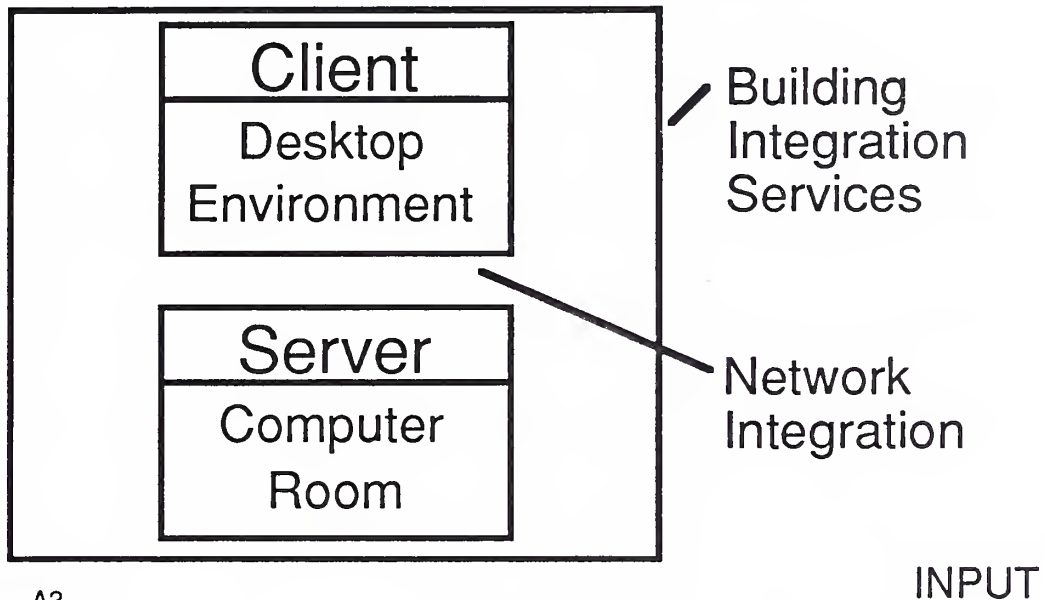
- Affect “environment”
- Computer room
- Cabling
- Power, air conditioning, etc.
- Network
- Buildings

CSP-ML- A2

INPUT

Notes

Modular Environment



CSP-ML- A3

Notes

Environmental Services

Market Drivers

- Recession
- Growth of workplace technology
- Networking
- User outsourcing trends

CSP-ML- A4

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Notes

Environmental Services

Market Inhibitors

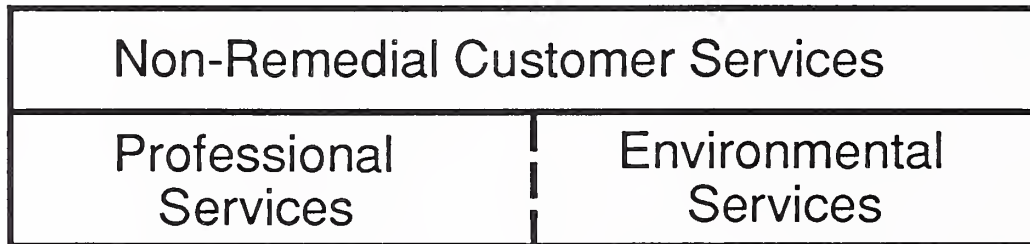
- Use of in-house resources
- Downsizing—in first wave
- Lack of user awareness
- Standards—too many/too few

CSP-ML- A5

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Notes

Market Segmentation



- ↓
- Consultancy
 - Design
 - Project mgmt.



- Computer room
- Cabling
- Power/Light/etc.
- Installations

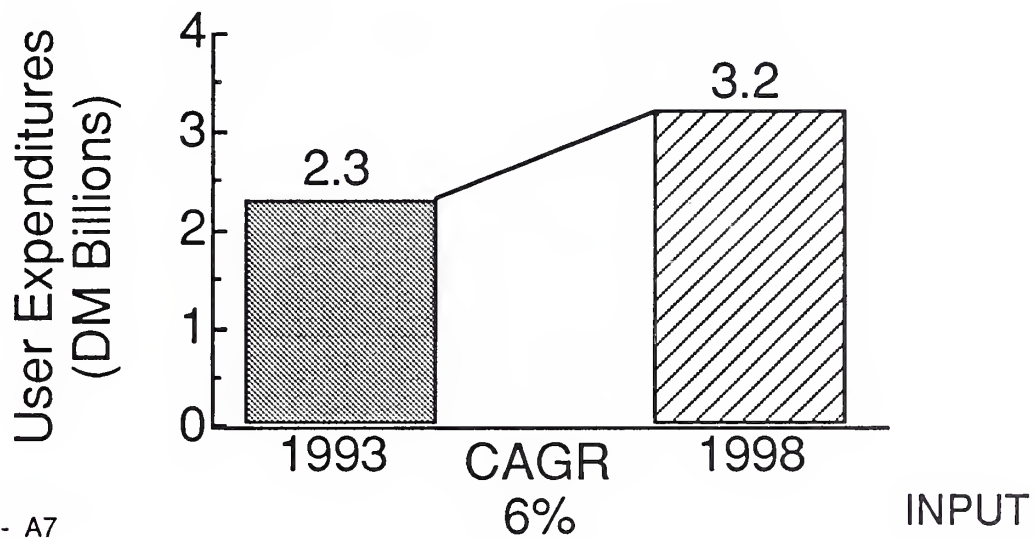
CSP-ML- A6

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Notes

Environmental Services, Germany

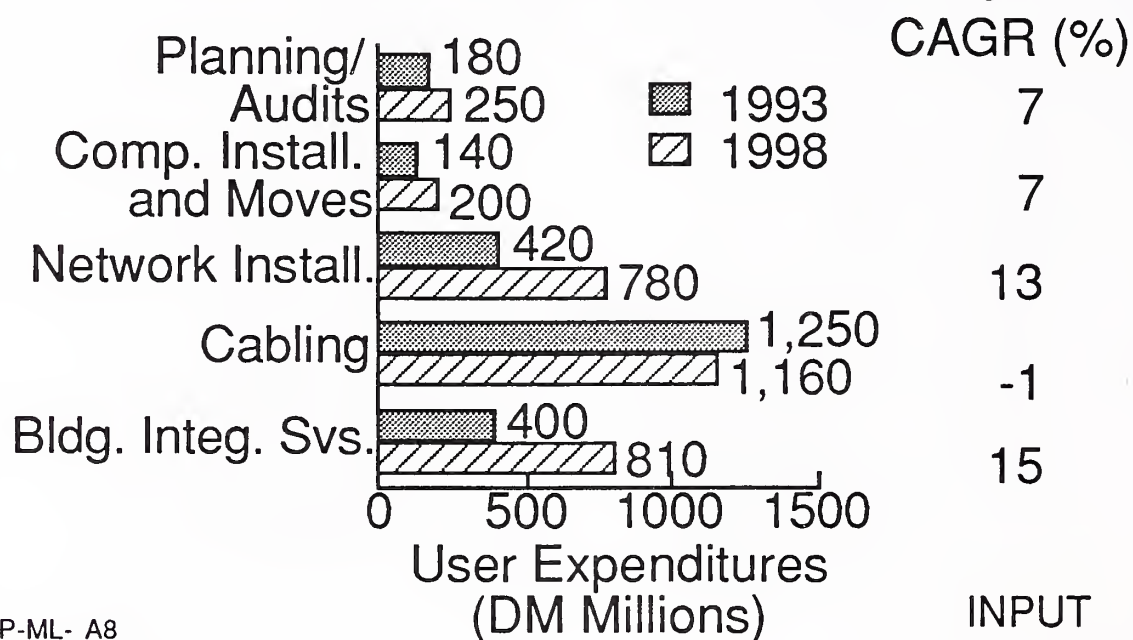
Market Growth



CSP-ML- A7

Notes

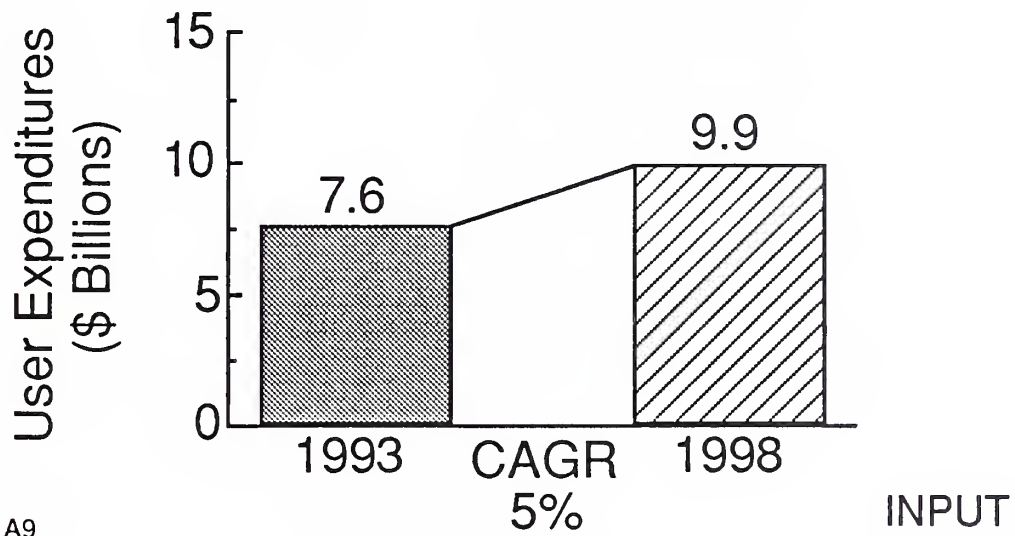
Sector Growth, Germany



Notes

Environmental Services, Europe

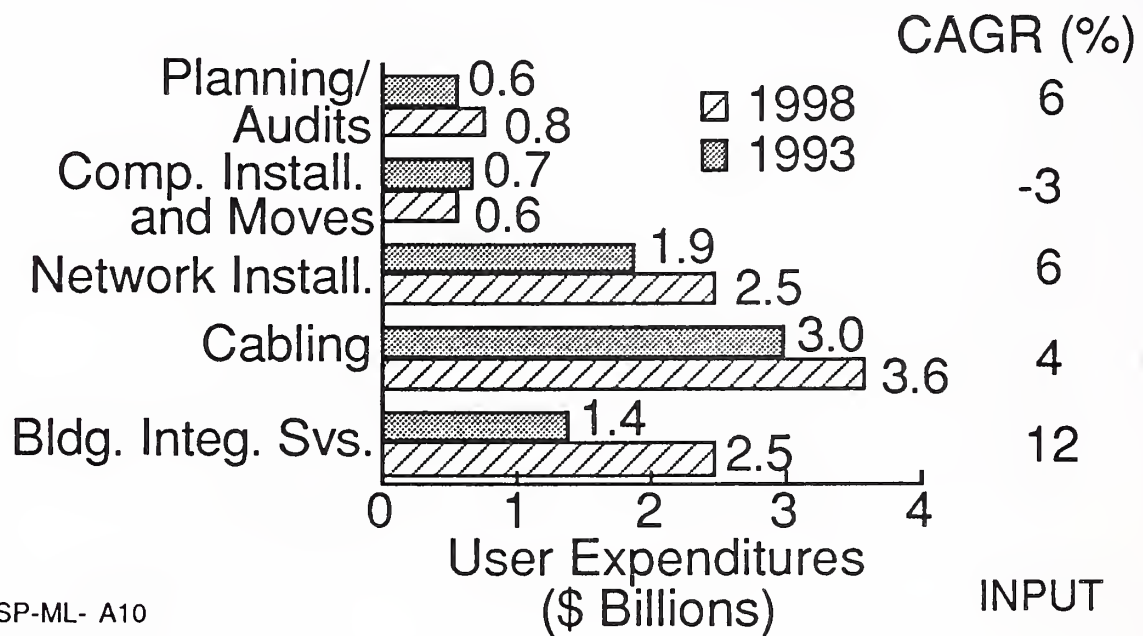
Market Growth



CSP-ML- A9

Notes

Sector Growth, Europe

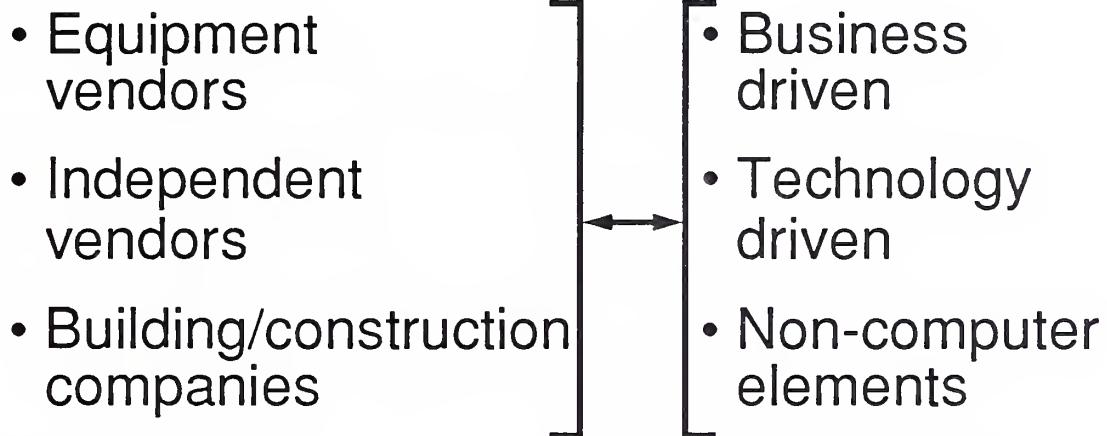


CSP-ML- A10

Notes

Competitive Environment

Fragmented Market

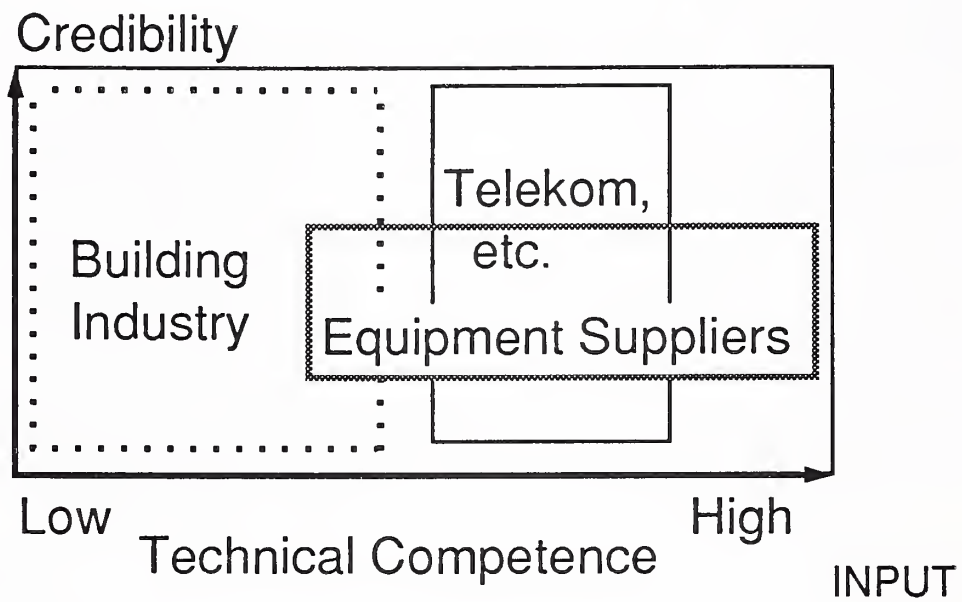


CSP-ML- A11

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Notes

Vendor Positioning



Notes

Competitors—I

Equipment
Vendors



CSP-ML- A13

INPUT

Notes

Competitors—II

Independent
Services
Vendors



CSP-ML- A14

INPUT

Notes

Competitors—III

Large
Construction
Companies



CSP-ML- A15

INPUT

Notes

Competitors—IV

Specialist
Building
Services
Consultant



CSP-ML- A16

INPUT

Notes

Competitors—V

Industrial
Controls
Systems
Vendors



CSP-ML- A17

INPUT

Notes

x

Environmental Services

Key Findings

- Need for vendor service not identified by over 50% of IS department users
- Fragmentation a key issue
- Need to specialise, then integrate

CSP-ML- A18

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Notes

Desktop Services

- An outsourcing sector
- Combination of support and upgrade
- Range of approaches
- German interest increasing with client/server

CSP-ML- B1

INPUT

Notes

Traditional Desktop—Unitised Services

- PC supply
- Network/server
- PC/printer maintenance
- Installation
- Training



CSP-ML- B2

INPUT

Notes

New Generation Services—In Combination

- ASP supply/support
- Help desk selection/supply
- Problems management
- Planning/administration
- Network upgrades
- Application development

CSP-ML- B3

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Notes

User Needs, General 1992-1995

- Acquire skills
- Stimulate end-users
- Upgrade the base
- Establish tools and methods
- Manage network
- Prepare an architecture

CSP-ML- B4

INPUT

Notes

User Needs, External 1992-1995

- Acquire client/server expertise
- Obtain messaging tools
- System integration
- Network management tools
- Better maintenance contracts
- Accounting and security tools

CSP-ML- B5

INPUT

Notes

Selection Criteria

- Network expertise
- Single supplier
- Up-to-date
- Independence
- Pan-European

CSP-ML- B6

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Notes

Digital's Service Offering

- Among services for technology
- 4 service lines currently
- Mix and match approach
- Sales - Force
 - DECdirect

CSP-ML- B7

INPUT

Notes

Hewlett-Packard's Service Offering

- Standard contracts
- Multivendor—including 3rd-party software
- Consultancy/customisation
- Specialist groups deliver

CSP-ML- B8

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Notes

ComputerVision Service Offering

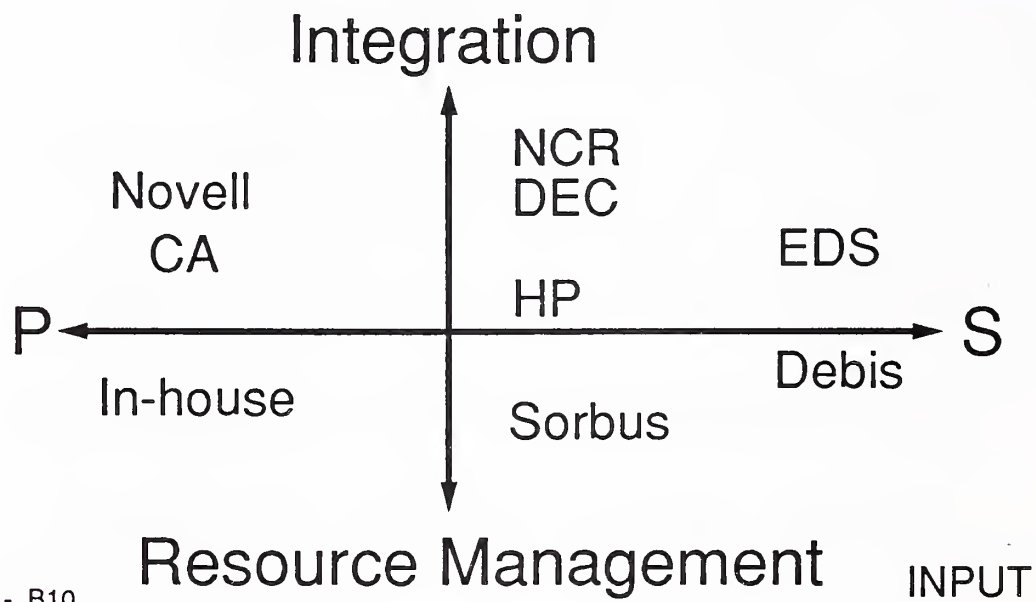
- Network planning/design
- Single-source 'Desktop'
- Standard supply/maintenance
- Open label
- Linked to Life-Cycle

CSP-ML- B9

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Notes

Vendor Positioning

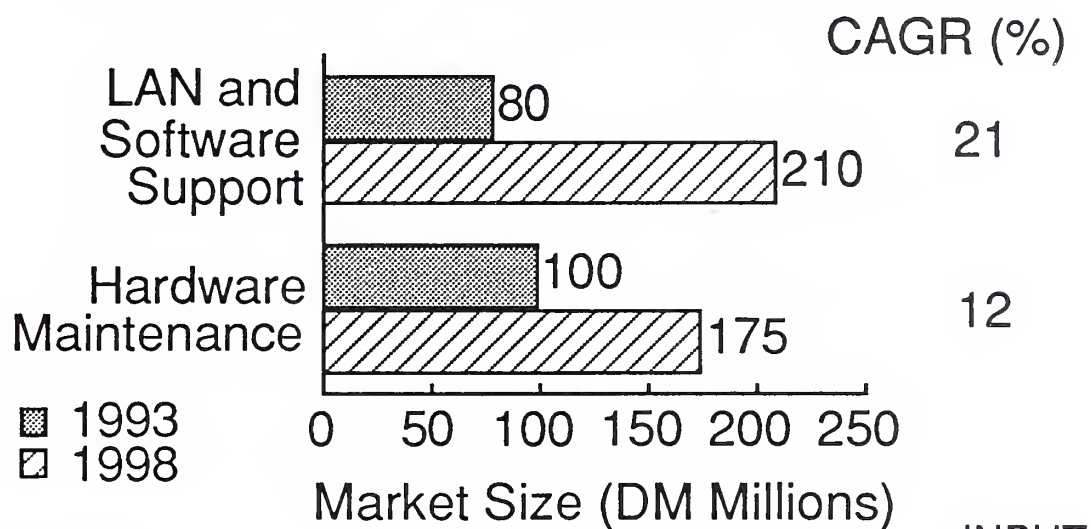


CSP-ML- B10

Notes

Germany

Desktop Services Market



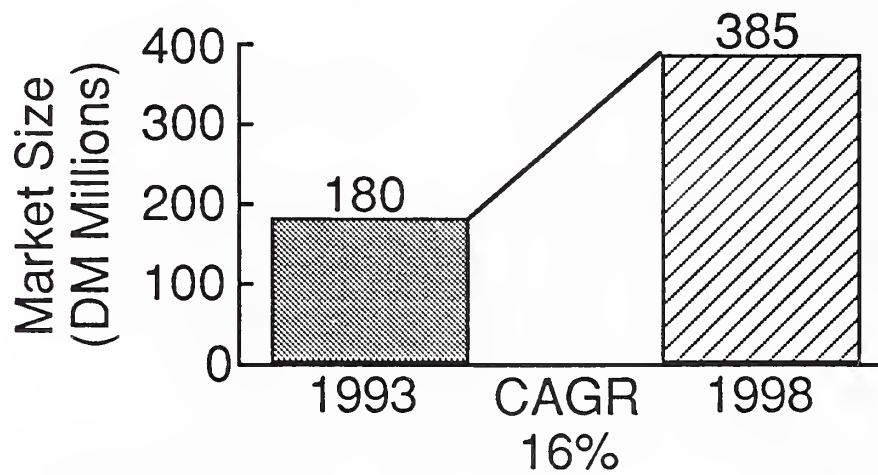
CSP-ML- B11

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Notes

Germany

Desktop (Including Maintenance)

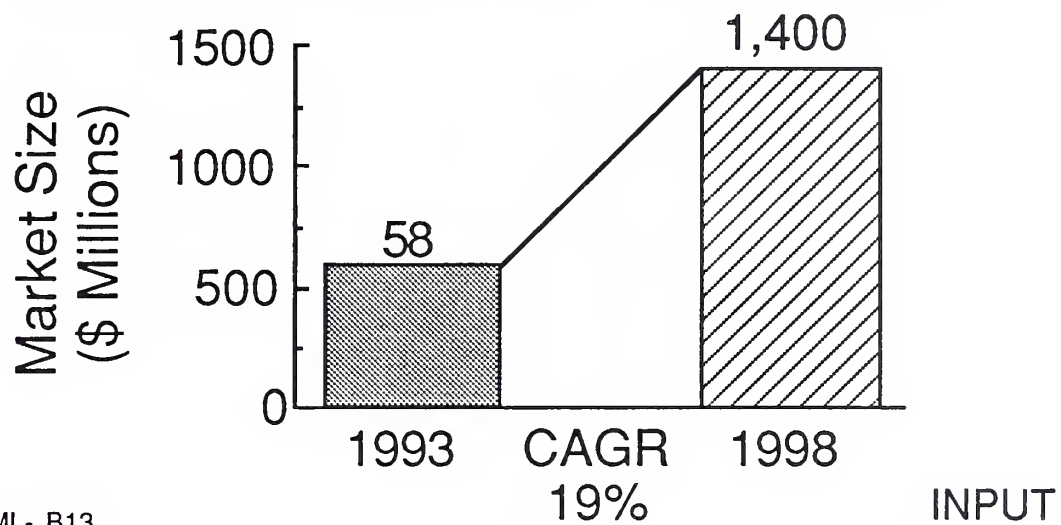


CSP-ML- B12

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Notes

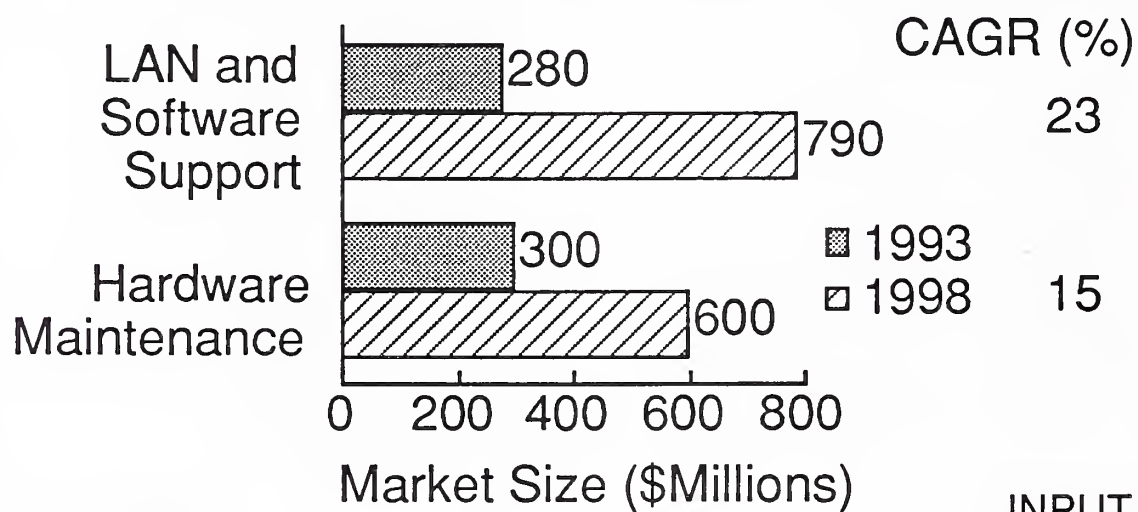
Desktop Services—Europe (Including Maintenance)



CSP-ML- B13

Notes

Desktop Services Market Europe, 1993-1998



CSP-ML- B14

Notes

Recommendations

- Innovate for differentiation
- Prioritise service elements
- Tools for partnership

CSP-ML- B15

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Notes



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 - Procurement Plans (PAR)
 - Forecasts
 - Awards (FAIT)
- **Commercial Application LEADS**

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For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

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Frankfurt

Sudetenstraße 9
D-35428 Langgöns-
Niederkleen
Germany
Tel. +49 (0) 6447-7229
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London

17 Hill Street
London W1X 7FB
England
Tel. +44 (0) 71 493-9335
Fax +44 (0) 71 629-0179

New York

400 Frank W. Burr Blvd.
Teaneck, NJ 07666
U.S.A.
Tel. 1 (201) 801-0050
Fax 1 (201) 801-0441

Paris

24, avenue du Recteur
Poincaré
75016 Paris
France
Tel. +33 (1) 46 47 65 65
Fax +33 (1) 46 47 69 50

San Francisco

1881 Landings Drive
Mountain View
CA 94043-0848
U.S.A.
Tel. 1 (415) 961-3300
Fax 1 (415) 961-3966

Tokyo

Saida Building, 4-6,
Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101
Japan
Tel. +81 3 3864-0531
Fax +81 3 3864-4114

Washington, D.C.

1953 Gallows Road
Suite 560
Vienna, VA 22182
U.S.A.
Tel. 1 (703) 847-6870
Fax 1 (703) 847-6872

